Section M1

Agency Management Functions

Program coordinators and managers will learn how to use the management screens: Agency, Program, Grant, APC and User. Most screens are processes that involve setting up programs funded thru OHCS, local programs which are temporary local programs, or agency match funds that are used to assist low income families.

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All SSNs throughout this manual have be covered for confidentiality purposes even though the test database was used.

Agency Screens

The 'Agency Management' screen functions are not available in the OPUS Weatherization Module to Add, Delete or Edit agency information contact the OPUS Helpdesk at opushelp@hcs.state.or.us. Include the following minimum information with your request.

NEW AGENCY INFORMATION WORKSHEET

NEW ☐ CHANGE ☐ DEACTIVATE ☐

1. Agency Name: _____

2. Tax Payers ID# _____

3. Subrecipient YES ____ NO ____

If YES Subrecipient to which agency _____

4. Contact Information

Telephone Number: _____

Fax Number: _____

5. Physical Address

Street Address (No P.O. Boxes): _____

City: _____

State: **Oregon**

Zip Code: _____

6. Mailing Address

Street Address: _____

City: _____

State: _____

Zip Code: _____

Figure 6-1: New Agency Worksheet

Program Screens

The 'Program' screen functions are not available at this time in the OPUS Weatherization Module to Add, Delete or Edit programs and/or apc's contact the OPUS Helpdesk at opushelp@hcs.state.or.us. Include the following minimum information with your request.

PROGRAM / APC WORKSHEET

All fields marked * are required

PROGRAM

***** Name (ACRONYM+2 DIGITYEAR) _____

* Code (e.g. WAP 12) _____

EFFECTIVE DATE

***** Start Date (MMDDYYYY): _____

***** End Date (MMDDYYYY): _____

Shared (Yes / No): _____

PROGRAM YEAR

* Federal Poverty Year _____

* Oregon Median Income Year _____

APC = Agency/Program/County

* Agency _____

County(1) _____

* Program _____

* Grant _____

* Start Date (MMDDYYYY): _____

* End Date (MMDDYYYY): _____

REMARKS/COMMENTS

_____

_____

(1) APC *without* a county denotes a 'Parent level' APC. APC *with* a county denotes the APC is a 'Child level' APC

Figure 6-2: Program / APC Worksheet

User Screens

A manager sets up user accounts and roles (permissions) in the OPUS system for the agency staff. Staff roles and actions depend on what job functions are to be performed by individual working in OPUS. Some users will have minimum; view only access. Some users will need additional roles to process client intakes and/or reports. Some users will have additional roles for management functions. There are six types of 'User' screens: 'Search', 'New', 'View', 'Edit', 'User Role Edit' and 'User Action Edit'.

User Search

The 'User Search' screen allows a manager and/or another user to search for a person who is registered in OPUS.

Setup:

On the 'Message of the Day' screen.

1. Using the 'Main Menu', scroll the mouse over 'Management', down to and click 'User' *(reference figure 6-3)*. The 'User Search' screen will appear next *(reference figure 6-4)*.

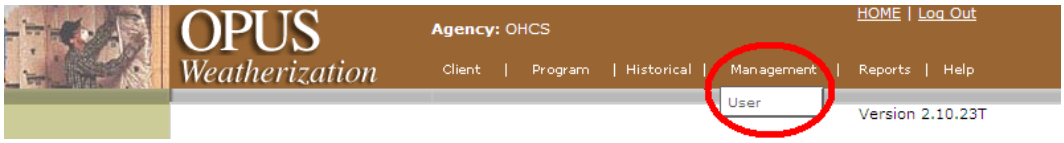

Figure 6-3: User Menu

Figure 6-4: User Search by agency screen.

2. Enter a user's name or search by 'Agency'. **Note:** Parent agencies have access to sub-agency staff within their structure. To search by 'Agency', use the drop-down arrow and select the appropriate agency and click 'Search'. To search by user name, type in the first and/or last name then click 'Search'.

A list of staff members will appear in the 'Search Results'. In the 'Search Results', user names can be placed in alphabetical order by first name, last name or login name by clicking on the link(s) *(reference figure 6-5)*.

Figure 6-5: User Search with Search Results screen.

3. Click on a name to see 'User View' screen. The 'User View' screen allows a manger to view an individual user's roles *(reference figure 6-6)*.

Figure 6-6: User View screen.

Possible Disabled User

IMPORTANT NOTE: If there is a possibility that a user might have been previously granted access to OPUS but a search results indicates no match, follow these steps:

1. Reference the procedure 'User Search'. In 'Search Results', if a specific user's name does not appear, click the boxes "Show Active Users Only" and "w/Rights to This Module", removing the 'Checkmark' then click 'Search *(reference figure 6-7).*

   These steps will allow an agency's users to appear regardless what module the user has permission to work in and it will show all users who have been disabled. To reactivate a disabled user, reference the 'Reactivate a User' section listed below.

OPUS
Weatherization
Agency: OHCS
HOME | Log Out
Client | Program | Historical | Management | Reports | Help
Version 2.10.23T
User
Search
View
New
Edit
User Search
Login Name
First Name
e.g. John
Last Name
e.g. Smith
E-mail
e.g. bob@yahoo.com
Agency
OHCS
Show Active Users only
W/ Rights to This Module
Search
Search Results
In Results, click Name to see User View Screen.
First Name | Last Name | Login Name | E-mail | Agency Name
RONALD | TOUB | RTOUB | ronald.toub@hcs.state.or.us | OHCS
BRENT | HOLMES | | brent.holmes@hcs.state.or.us | OHCS
KERRI | HAWORTH | | Kerri.Haworth@hcs.state.or.us | OHCS
EARL | RUTLEDGE | | john.rutledge@hcs.state.or.us | OHCS
STEVE | DIVAN | | steven.divan@hcs.state.or.us | OHCS
SARAH | MENTZER | | Sarah.Mentzer@hcs.state.or.us | OHCS
TEST | USER | | test.user@hcs.state.or.us | OHCS
LIEM | NGO | | liem.ngo@hcs.state.or.us | OHCS
Login names have been blocked
Timeout: 17:24
Data Classification: 2
Oregon Housing and Community Services
All Rights Reserved | Site best viewed with Internet Explorer 5.5 SP2 or higher
HOME | Logout

Figure 6-7: Searching for users, Active users and rights to the module screen.

2. If there are no matches found in the database, a manager can create a new user.

User New

The User New Screen allows a manager to create a new user in the OPUS System.

Setup:

On the 'User Search' screen.

1. Using the left Nav Bar, under 'User', click 'New' *(reference figure 6-8)*. The 'User New' screen will appear next *(reference figure 6-8A)*.

Figure 6-8: User Search – New User screen.

Type or select (*all fields marked * are required*).

- User name. **Note:** Refer to the User name and password requirements link.
- First name.
- Last name.
- Middle name or initial (optional).
- Initials.
- Title.
- Role - includes the "Permission Levels" by screen.
- E-mail.
  OHCS communicates regularly via e-mail. OPUS Temporary Passwords are sent automatically via email. OPUS Broadcasts are via e-mail along with announcements.
  Make sure the e-mail address is correct. **OPUS Broadcasts are announcements from OHCS stating something is wrong or something is being worked on, updated or fixed. OPUS Broadcasts are done on 'URGENT' basis only. Read all OPUS Broadcast.
- Phone and Extension if applicable.
- Agency.

Click the 'Save' button to save The User View screen will appear next.

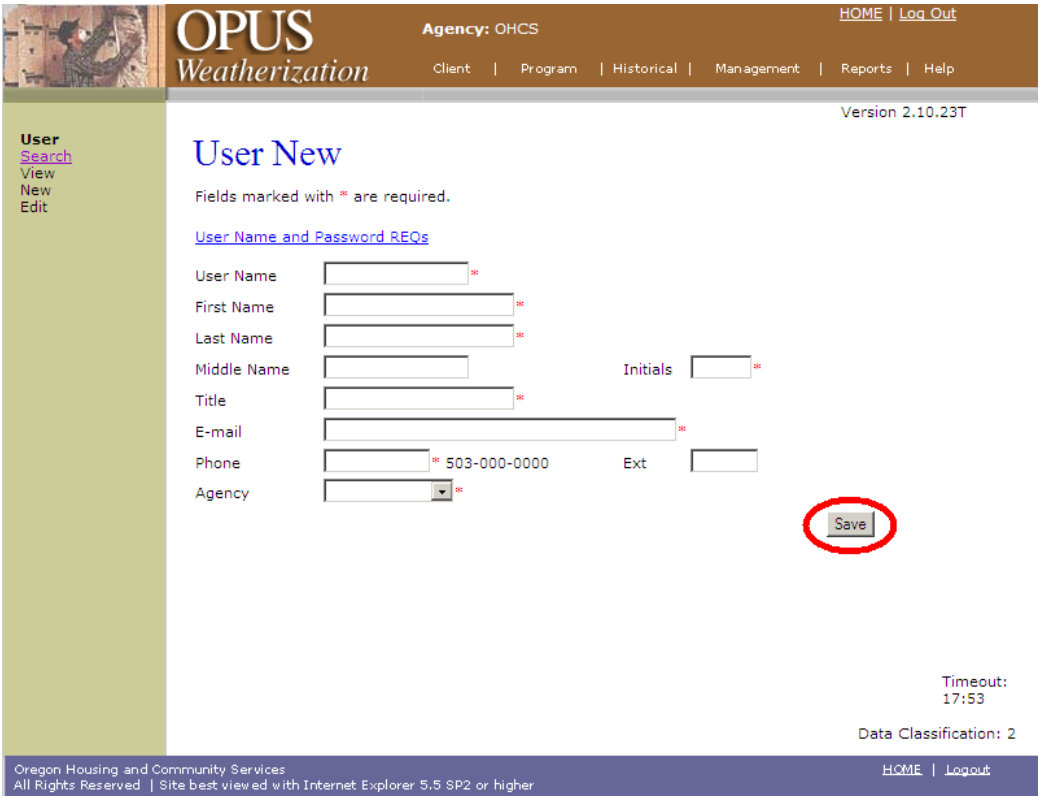

Figure 6-8A: User New screen.

User View

The 'User View' screen allows a manager to view or edit information on an individual user and to view 'Roles' (permission) level a user has been assigned *(reference figure 6-9)*. To edit roles, follow the instructions listed below.

Figure 6-9: User View – to Edit screen.

User Role Edit

The 'User Role Edit' screen allows a manager to grant or adjust the roles and actions a user has access to on an as needed basis, per screen or assigned task. To edit user roles and actions, follow the steps below.

Note: There are two steps issuing roles. The first step is establishing permissions for a user. For each role there is a default set of actions, which initially allows permissions to ***all*** the actions associated within the specific role.

Setup:

1. On the 'User View' screen, click the 'Edit Roles' button or click on the 'Edit Roles' link in the Left Nav Bar *(reference figure 6-9, above)*. The 'User Role Edit' screen will appear.

2. On the 'User Role Edit' screen, select the role(s) the user will have access to *(reference figure 6-9A, below)* then click the 'Update' button to apply the roles. The 'User View' screen will appear again. The 'Roles' are now listed in the 'User View' screen *(reference figure 6-9C)*. **This completes Step One**.

   If the user needs all the default permissions associated with a given role, there is no need to do any further steps. There may be times when a user *needs* additional permissions within a role so they can do specific actions within a specific role.

   At the same time, there might be permissions within a specific role that a user *does not* need access to perform. To customize permissions within a role, follow the instructions below.

User Action Edit

Setup:

On the 'User Role Edit' screen.

1. Click on 'Edit Actions' *(reference figure 6-9A)*. The 'User Role Action Edit' screen will appear *(reference figure 6-9C)*.

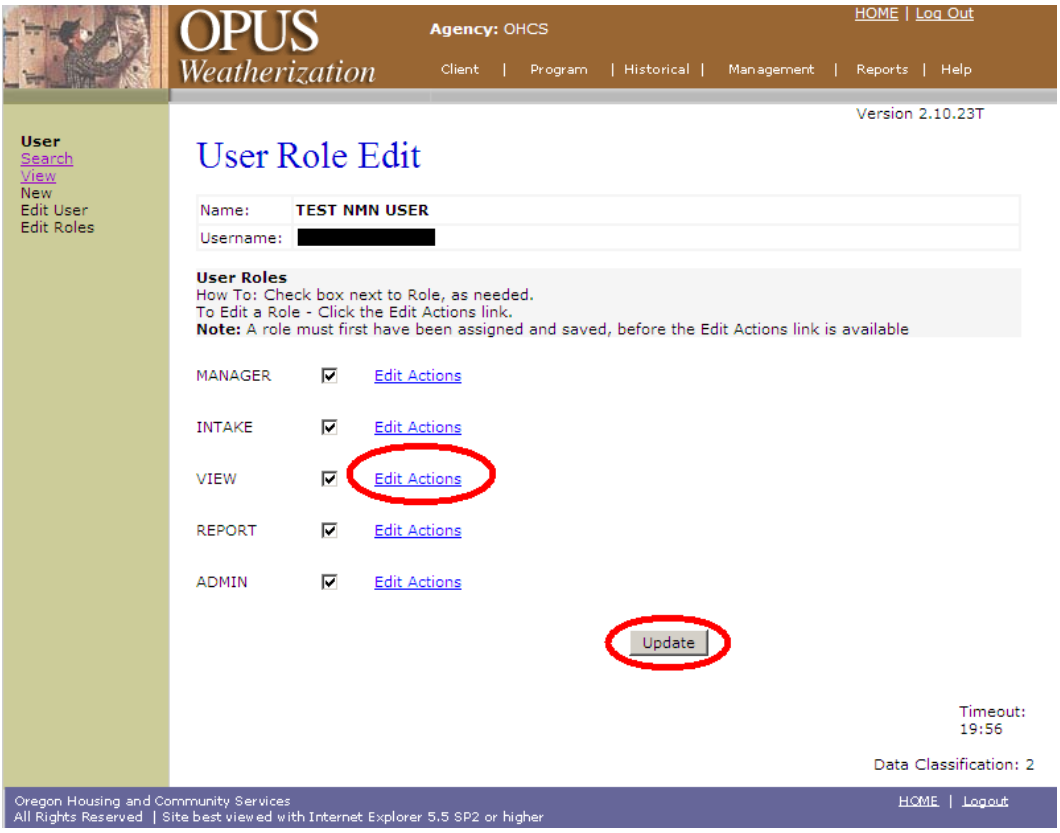

Figure 6-9A: User Role Edit screen.

2. On the 'User Role Action Edit' screen, a manager can 'Allow' or 'Deny' permissions within any specific role. The permissions are decided by the OPUS Administrator and Manager(s) of the agencies. Once permissions have been assigned, click the 'Save' button. The 'User View' screen will appear. This step needs to be repeated for each specific role that requires permission within it to be edited *(reference figure 6-9B)*.

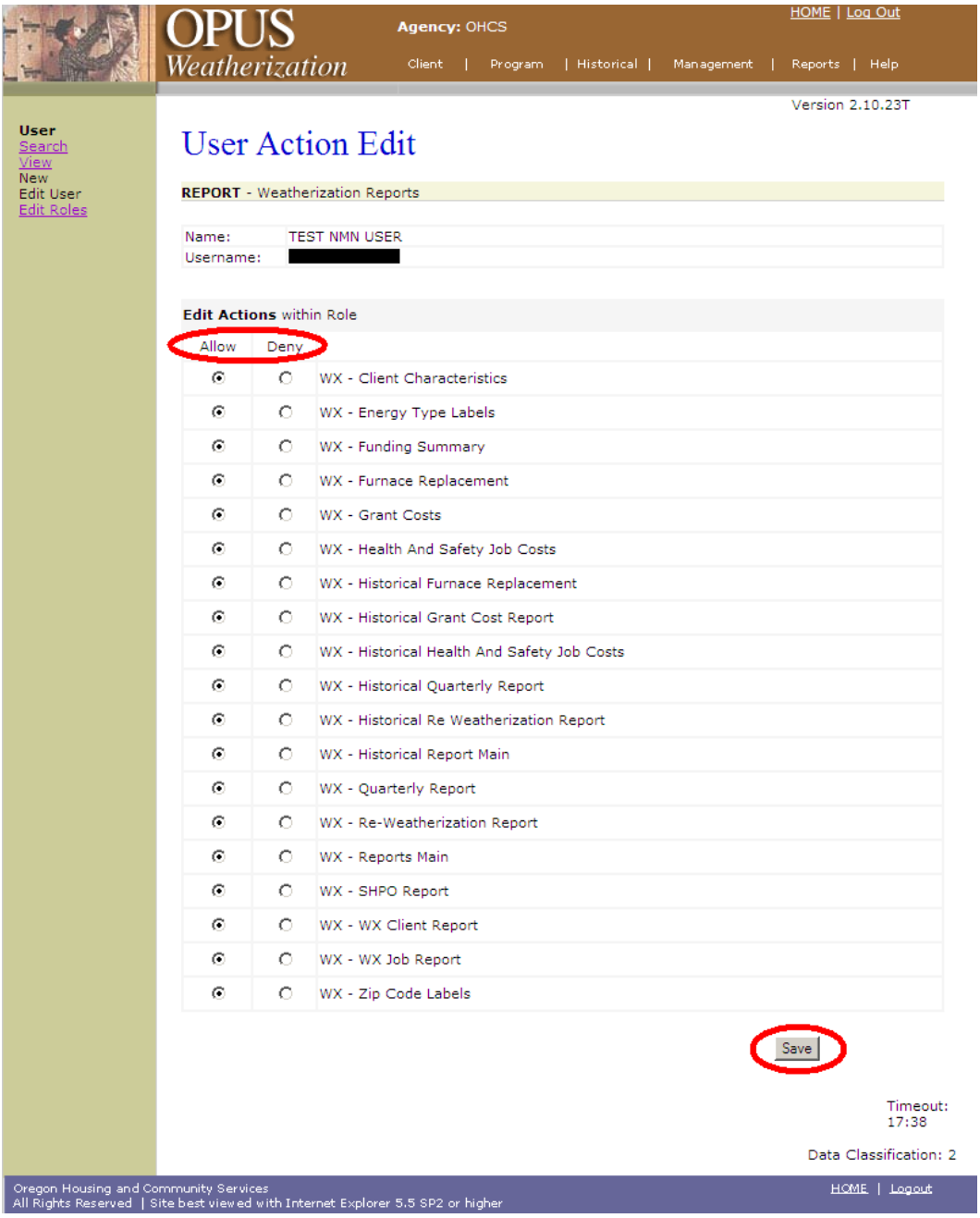

Figure 6-9B: User Role Edit screen.

Disable User

When users are disabled, the user's name is basically cancelled. The user's name stays in the database in an inactive list and never really deleted. To locate a user that could have been deleted, refer to 'Possible Deleted User' previously discussed.

To cancel a user account, a manager will click the 'Disable User' or 'Disable User/All Modules' button *(reference figure 6-9C).* For user(s) who have access to multiple modules, it's best to use 'Disable User/All Modules'.

Figure 6-9C: User View Delete User screen.

Reset User Password

Setup:

1. Using the 'User View', click the 'Edit User' button or the 'Edit User' link in the Left Nav Bar. The 'User Edit' screen will appear *(reference figure 6-10).*

Figure 6-10: User View screen.

2. On the 'User Edit' screen, check box "Reset password". A manager would use this feature if a current user forgot the password or if an agency has a policy to reset passwords for routine reasons *(reference figure 6-11).*

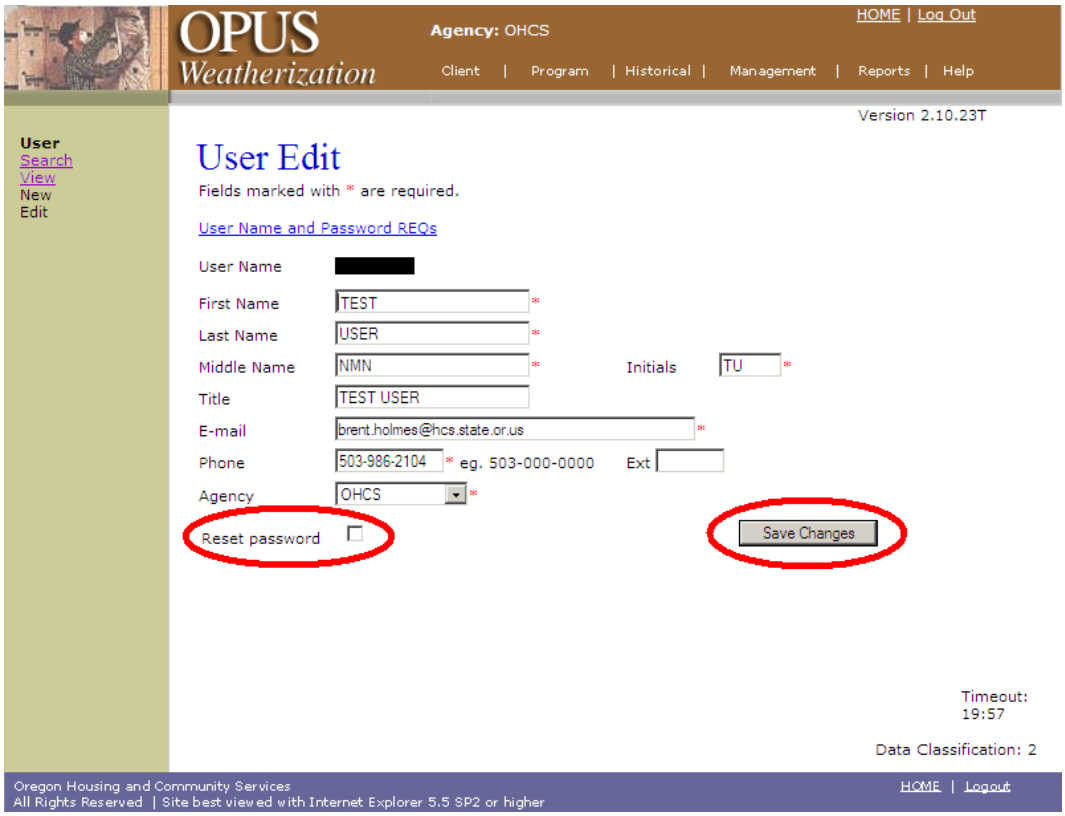

Figure 6-11: User Edit – Reset Password screen.

3. Click the 'Save Changes' button. The User View screen will display. The user will need to log in the next time with a temporary password (reference **Section One - Basic Operations**).

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